



DEPARTMENT OF THE NAVY
HEADQUARTERS UNITED STATES MARINE CORPS
2 NAVY ANNEX
WASHINGTON, DC 20380-1775

IN REPLY REFER TO:

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LSR

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INSTALLATIONS AND LOGISTICS POLICY MEMORANDUM 1-04

From: Deputy Commandant for Installations and Logistics
To: Distribution

Subj: INQUIRY RESPONSE SYSTEM (IRS)

Encl: (1) Addendum I&L Department Procedures For Processing Program
Budget Decisions

1. General. IRS is an automated workflow document management system, owned and managed by P&R, and used to staff and respond to various inquiries submitted to CMC by the Department of the Navy, Department of Defense, and Congress. Specifically, IRS is used in preparing Congressional testimonies, answering Congressional questions for the record, and responding to various budget decisions such as Program Budget Decisions and Navy issues. Once approved through the process, the answers to IRS questions are archived so the Marine Corps responds to follow-on questions consistently.

2. Responsibilities. Responding to IRS taskers is a team effort. Routinely, responses to these taskers are under a very compressed timeline. To facilitate answering taskers in a timely manner, the following procedures are provided.

a. The Logistics Support Resources Branch (LSR) has primary responsibility for managing the IRS workflow within the Department. This responsibility includes the following actions:

(1) Coordinates and schedules Assistant Deputy Commandant, Installations and Logistics (ADC, I&L) reviews, Divisions' deadlines, deadline extensions, and Department review follow-on actions.

(2) Prior to submitting to ADC, I&L for final approval, ensures Division directors or their designated representatives, approve all responses.

(3) Once approved, forwards responses to Programs and Resources.

(4) Provides periodic training to IRS users within the Department.

(5) Maintains a topical index and corresponding Action Officer (AO) listing.

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b. All other Divisions.

(1) Ensure AOs are properly assigned and available to develop appropriate responses.

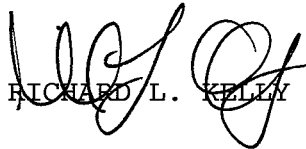
(2) Coordinate with LSR to request deadline extensions.

(3) Monitor and follow-up on taskers daily to ensure deadlines are met. Alert LSR coordinator of any delays that may impact ADC's review.

(4) Identify Division approval chain of command for taskers and list the approving official in the response. This ensures senior members of the Division are validating the accuracy and consistency of responses.

(5) Continually update the topical index and corresponding AO listing to enable correct workflow assignments.

(6) Direct external inquiries or taskings pertaining to Congressional or budget matters to LSR.


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Distribution:

ADC
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ADDENDUM

INSTALLATIONS AND LOGISTICS DEPARTMENT PROCEDURES FOR PROCESSING PROGRAM BUDGET DECISIONS

I. Background.

Each summer the Marine Corps submits its portion of the Naval bi-annual budget request. In preparation for submitting the President's budget, Office Secretary of Defense (OSD) reviews Service inputs and initiates adjustments. These adjustments, known as Program Budget Decisions (PBDs), leverage economic conditions and seek to balance resource allocations among competing programs. PBDs typically recommend an alternative funding profile and direct actions or funding increases or decreases.

During the October/November budget review cycle, OSD initiates and distributes PBDs. The Marine Corps Program and Resources Office (RFC) coordinates and receives notice of decisions affecting Marine Corps Programs through the Navy Headquarters Budget Systems (NHBS). Using our Inquiry Response System (IRS), RFC simultaneously enters and assigns PBDs to the appropriate Departments. Interested personnel can monitor PBDs at the following web site:
<http://navweb.secnaw.navy.mil/nhbs/>

Departments may address the impact of a proposed PBD by submitting a written response--reclama. OSD's reclama process is extremely limited in time and Departments must coordinate all responses both internally and with P&R. Extensions are rarely given and once a final decision is rendered, associated adjustments are implemented. It is not uncommon for OSD to issue PBDs late Friday afternoon with reclamation due back as early as the following Monday. I&L's Divisions and Action Officers must be readily available or accessible to ensure potential PBDs are effectively evaluated and reclamaed.

II. System Procedures.

It is DC, I&L's policy to utilize P&R's IRS database to review, submit, and track all PBD reclamation. P&R's system enables all stakeholders to:

- Manage multi-level deadlines by visually monitoring, locating, and checking the status of any action.
- Ensure that Department reviews are complete prior to responses being released. I&L prepares and submits its PBD responses in IRS per the following business rules:
 - Step 1: Action Officer (Branch)
 - Step 2: Division (LB, LF, LK, LP, LR and LS)

- Step 3: LSR
- Step 4: Department (LS; EA; ADC, I&L)

III. Reclama Process.

Response development, system entry, and Division review for each PBD/reclama usually all occur in the same day.

a. Notification:

- IRS notifies Departments and Divisions of an assigned PBD Inquiry by generating an e-mail notice (i.e., IRS inquiry created).
- The e-mail notices provide a direct link into IRS and the associated PBD inquiry.

Note: Unlike other IRS action notices, during a PBD cycle notifications are directed only to the Department and Division and not directly to the associated Action Officer.

b. Receipt of Notification.

Each Division will access the established link and complete an immediate assessment to determine if the purposed action positively or negatively impacts their programs. **Within 30 minutes of release notice, each Division will notify LSR, by email, of their intent to reclama the proposed PBD.** Division email responses to LSR must provide (in the subject line) the *IRS inquiry and PBD numbers along with an intended reclama position (yes/no)*. For example:

From: LF
 To: Churchill, Cynthia; Copeland, Thersea
 Cc: Nofziger, Jill; Relyea, Bill
 Subj: IRS Inquiry# 5731, PBD# 913, YES

c. Reclama Development Via IRS.

Each time a tasker moves from one step to another (i.e., Action Officer, Division, Department) IRS will generate an email notice of required action. The following summary of events briefly outlines the reclama process:

- Divisions will create and assign their taskers to the appropriate Action Officer(s).
- Action Officers will enter and forward their draft reclama in the IRS database to their Division Head for review and approval.

- The name of the official authorizing division and branch release will be included in the comments field (i.e., this field will appear after the user selects the *send forward* button. This entry will be displayed on the workflow history tab in the tasker).
- Divisions will review, amend, and release endorsed reclamationas to LSR--to include the releasing official's name, as described above.
- LSR will staff and coordinate I&L's final review and release.

IV. Preparing Reclamationas.

Consider the following when preparing a reclama response:

- Ensure the rationale behind the PBD is understood. Contact the P&R program analyst for additional information if required.
- Draft reclamationas to address the Marine Corps specific issue (CONDITION/CAUSE/EFFECT) and rationale that would overturn the purposed PBD.
- Do not include extraneous information. Be direct and succinct.
- Introduce arguments not previously addressed and be specific about impacts the mark will have upon your program and other related areas. A reclama response must clearly demonstrate the effect of the action if the position is to be reversed.

V. Entering Data into IRS.

P&R designed IRS to allow tab fields to print out the correct format according to the type of response you are preparing. Depending on the type of inquiry (i.e., NavCompt, PBD, DoNPIC) and response, the system will automatically enable data fields requiring completion. The following steps will help enter data properly into the IRS system:

- a. Action Officers must enter a complete response by entering applicable data in all activated fields on the response tab.
- b. Action Officers must enter a response for each assigned task. If an assigned task has one or more questions within the task, you may answer each in kind. However, if each question is assigned as a separate task then the response must be entered into each task.
- c. Unless P&R directs otherwise, responses are entered directly into the response tab in the comments field.

d. The response comments field will not retain tabbed data, tables or data in columns. If lists of data or spreadsheets are required, please attach as documents.

e. Attachments must support the text entered in the response comments field and will be appropriately cross referenced.

f. Users can cut and paste data from another document into IRS. However, you must review the text and take out any extraneous characters.

VI. Deadlines.

a. The Department's deadline can be located on the Inquiry Due Dates and Notification tab.

b. Once a tasker has been created, the Department's internal deadlines (i.e., Division and Branch) can be located in the Taskers Workflow History tab.

- In the tasker, the deadline displays the date and time the response has to be at the next level.

- Action Officer
- Division Deadline (displayed as Branch)
- Department Deadline

c. Division and Branch coordinators will monitor and follow-up on the status of their taskers and responses to ensure deadlines are met.

VII. Extensions.

OSD review schedules drive PBD deadlines and rarely accommodate extensions. Extensions impact multiple levels of review:

- Divisions must email LSR requesting any and all extensions.
- Extension requests need to be sent to the following POCs:

Primary: ChurchillCL@hqmc.usmc.mil
Secondary: CopelandTA@hqmc.usmc.mil
RelyeaWJ@hcmc.usmc.mil
NofzigerJH@hqmc.usmc.mil

VIII. ADC, I&L Review.

a. ADC, I&L reviews and approves all Department responses prior to release.

b. ADC, I&L reviews Division deadlines, LSR schedules
Department review follow-on actions.

c. If possible, ADC, I&L prefers to have one full day to review
drafted responses prior to release.

Interest item: Divisions need to be cognizant of ADC, I&L desired
review timeframes when establishing internal deadlines. Divisions
must liaison with LSR on any expected delays that may impact ADC, I&L
review. Also, Divisions must ensure that Action Officer(s) or a
subject matter expert, is available during ADC, I&L review of their
reclamas.

IX. Summary.

Effective and timely responses to PBD(s) is critical to safeguarding
scarce resources and enabling program deployment. Working as a
seamless team, we must focus on accurate and well-written reclamas to
ensure that our positions are defensible prior to final decision.
Focus and professional dedication will enable us to provide the Marine
Corps the service it deserves.